

Welcome to the Department of Technology Customer Forum

SERVICE REQUEST FULFILLMENT





Agenda

- Opening Remarks Ellen Ishimoto, Assistant Chief, CalTech
- Background Julie Jensen, Customer Delivery Division, CalTech
- Overview of the Service Request Fulfillment
 Project Kimberly Glenn, SRF Project
 Manager, CalTech

Background – CSS Migration Study

The Customer Service System (CSS):

- The primary system for internal and external customers to submit requests for CalTech services
- An antiquated, web-based application
- Received low customer satisfaction survey ratings

A CSS Migration Study was performed to determine if other tools utilized by CalTech could replace CSS functionality:

- Team developed high-level business requirements with input from over fifty external customers and CalTech employees.
- The results of the study and technical review confirmed that Remedy was fully capable of meeting CalTech's requirements.

CSS Migration to Remedy Benefits

- Provides a single entry system for managing CalTech service requests.
- Improves customer experience.
- Supports CalTech's goal to adopt IT Service Management best practices.
- Establishes a repeatable and standardized process for Service Request fulfillment

Service Request Fulfillment Project

The SRF project will implement service request types using an iterative approach:

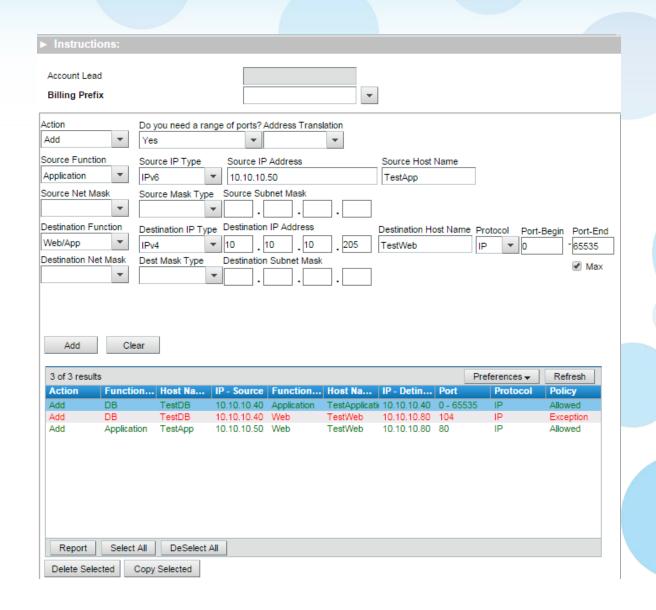
- Phase 1:
 - Deploy the Initial Service Request (SR) Types in Remedy: CalCloud Onboarding, Professional Services, Firewall
 - Other new SRs will be submitted via Remedy using an "Other" SR Type
 - Existing SRs will be processed to completion in CSS (with exceptions).
 - Scheduled for completion 2nd Quarter 2015
- Future Phases
 - Create the Remaining Service Request Types and Reduce the Number of "Other" SRs

SRF Process Improvement

Goals and Objectives in partnership with our customers

- Enhance functionality and ease of use,
- Shorten Service Request Fulfillment timeframes, and
- Provide timely Service Request status updates.

Firewall Service Request



Professional Services Service Request

Professional Services					
Requested By Jesse Kona	PI	hone	209 4712790	Edit	
Requested For Jesse Kona	E	mail	jkona@columnit.com		
Required Completion					Quantity 1
Attachments:					
▼ 1 Instructions					
Billing Prefix				-	
Account Code					
Approver				-	
Do you wish to expedite this request?	No		○ Yes		
Are you requesting a Cost Estimate?*	○ No		O Yes		
Do you have an approved budget amount?*			Yes equesting, a budget amount may l nswering no here may result in del		
I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. *	Yes			-,	
Customer Type	Internal		External		
What kind of consulting are you requesting? *				•	
Summarize your request:*					
Request details *					
How many hours are you going to need? *					
Contract start date				1	
Expected contract end date					

Customer Involvement

The SRF Project is reaching out to customer organizations for representatives to participate in testing and feedback activities. Please contact CIOSRM@State.ca.gov for more information.

Training

Classroom/Instructor Training

- At CalTech or your organization
- Classes to begin April 2015
- Contact CIOSRM@State.ca.gov to schedule.

System Documentation

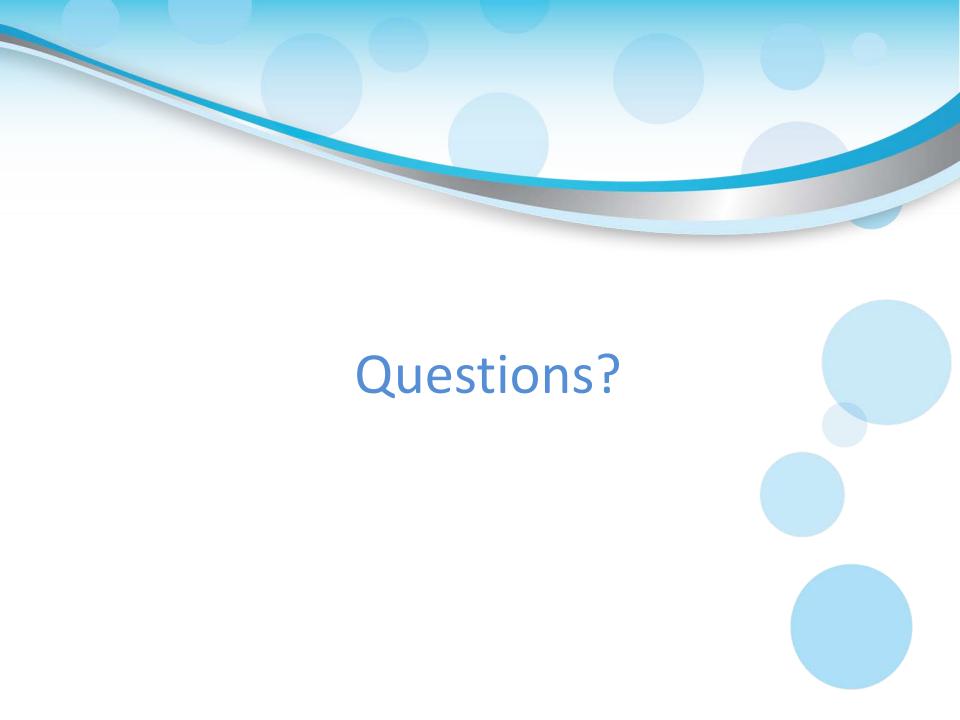
 Documented procedures will be provided to all customers.

Future Meetings

To ensure our customers are kept informed and involved, CalTech has created monthly SRF Customer Meetings.

- − First Thursday of each month: 1:30 2:30 p.m.
- Meetings will be held at the Prospect Green Facility:

CalTech Training & Events Center
10860 Gold Center Drive, Building 1, First Floor
Rancho Cordova, CA 95760



Thank you

For further information please contact

CIOSRM@State.ca.gov